



# Travel and subsistence policy

This policy is also available in Welsh.

**Information box**

For further advice contact: Finance  
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**Version control**

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Normally, this policy and procedure will be reviewed every three years or whenever a relevant change in legislation occurs. In addition, the policy and procedures may be reviewed at other times, for example at the end of the first year of operation.

**Impact Assessment**

- A business rationale assessment has been carried out and this policy contributes to Estyn's strategic objectives and delivery principles.
- An equality impact assessment has been carried out and this policy is not deemed to impact adversely on any people on the grounds of Welsh language, age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

This policy and associated procedures are agreed by Estyn and its Trade Unions. Any enquiries or comments regarding this policy should be addressed to:

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This and other Estyn publications are available on our website: [www.estyn.gov.uk](http://www.estyn.gov.uk)

**This document has been translated by Trosol (English to Welsh)**

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## Section 1: Travel

### General principles

- 1 This section sets out the rules for payment of expenses incurred by Estyn staff, secondees, agency staff, non-executive directors and members of Estyn’s audit committee who travel on official Estyn duty. The rules provide for the reimbursement of expenses necessarily incurred wholly and exclusively in carrying out official duties away from your home or normal place of work. Claims must not, therefore, include expenditure not strictly necessitated by official duties.
- 2 Estyn’s rules and processes concerning travel and subsistence payments have been developed considering the following principles:
  - a) the need for efficiency, effectiveness, and value for money
  - b) the importance of ensuring that claimants are fully and speedily reimbursed for expenses actually and necessarily incurred
  - c) the need for administrative arrangements to be the minimum compatible with adequate accountability
  - d) the need for payments not to incur a taxation liability for the individual or Estyn
  - e) application on an equal and fair basis
  - f) flexible and relevant to the current working day for all staff
- 3 Individuals are responsible for the cost of daily travel between their home (‘home’ means the place at which the person making a claim under this policy normally lives) and normal place of work. Office-based staff travelling from home to a venue other than their regular place of work must refer to the guidance in paragraphs 32 and 33.
- 4 Individuals should use the most efficient and economic means of travel considering: the cost of travel; the cost of subsistence; savings in official time; sustainability matters; health and safety issues; and, the practicality of the journey, including meeting the needs of individuals with health or mobility problems.
- 5 You must ensure that when planning your travel, sustainability and environmental considerations are fully considered. You should balance these issues alongside the range of factors you need to consider including time pressures, cost and other work commitments.

- 6 Individuals should give careful consideration as to whether the need for travel can be avoided or reduced e.g. through amalgamation of visits, car sharing and through remote working.
- 7 Estyn reserves the right to refuse to reimburse claims (and may recover payments) in respect of expenses that were unnecessary to the official purposes of the visit, for goods/services not permitted within this policy, or expenses which could have been avoided had the journey been better planned.
- 8 When organising meetings, events or activities, Estyn will consider the suitability of the venue and implications for travel, e.g. whether to hold meetings in locations which are served well by public transport and which minimise travel for attendees.

### **Responsibilities of the claimant**

- 9 Claimants under this policy are expected to observe the highest standards of financial propriety. The deliberate and knowing submission of a false claim by a claimant is a serious offence and could lead to action under Estyn's anti-fraud policy and disciplinary policy. If there is clear evidence of fraud, disciplinary action will be taken against an individual which may not only result in dismissal but may also result in the individual being charged with a criminal offence. If you have any doubts about what you can claim then please seek advice from your line manager or the Finance team, ideally before you make an official journey.
- 10 If you accept a payment knowing that you have no entitlement, this can also amount to fraud. If you receive or continue to receive payments to which you know, or suspect, you are not entitled, you have a responsibility to report the instances to the Financial Services Manager

### **Receipts**

- 11 When claiming reimbursement of actual costs you must be able to support each item of your claim with valid, itemised receipts. You should always request a receipt and check the accuracy of date, time, items, supplier, and amounts. **Note that credit and debit card slips are not suitable alternatives to an itemised receipt and should not be submitted without the prior agreement of the Financial Services Manager.**
- 12 If any of these details are not clear or if you find an error, you must attach a note of explanation to the receipt rather than amend the receipt. It is acknowledged that it may not always be possible to obtain a receipt: the absence of a receipt does not stop you from claiming the expense but in such instances, you should make and retain a note of explanation.

- 13 Where a bill is met by one person on behalf of a group, then everyone should copy the receipt and record the monies they have individually incurred. This copy of the receipt should be uploaded with your claim into SAP Concur (expenses claim platform)
- 14 Provided itemised and dated receipts are uploaded into SAP Concur, there is no requirement to retain the receipts. It remains your responsibility to ensure receipts successfully appear in SAP before you destroy your receipt.
- 15 Where expenditure is incurred via a procurement card, the receipt will be attached to the transaction on the card portal. If you have confirmed the validity of the transaction on the card portal, it will meet HMRC's receipts requirement.

### **Welsh Procurement Cards (WPC)**

- 16 If you are a regular traveller, you may apply for a Welsh Procurement Card (WPC). These cards are welcomed globally at establishments (i.e. restaurants, hotels, car hire and garages). WPC Cards must only be used for subsistence purchases (see Section 2) or fuel for hire cars.
- 17 Where a WPC has been used, all the provisions of these principles continue to apply. Particular attention should be paid to subsistence limits and the provision to reimburse the costs of non-alcoholic drinks only (irrespective of accompanying meal) and the need to retain and upload an itemised receipt (see [Receipts](#) above)

### **Travelling while on leave**

- 18 If you are required to make a journey for official purposes and then wish to take leave or spend a weekend in the same area before or after the official business, you may be allowed the full return fare at the appropriate class or rate for the distance which would have been travelled for the official business alone. In such instances you should obtain written approval from your line manager before journey commencement.

### **International travel**

- 19 Your safety is a primary concern for Estyn. If you are required to work outside of the UK and Ireland on official business, you must complete an International Travel Risk Assessment form (see Appendix B) prior to making travel arrangements. You should submit your completed form to Head of Finance and Business Services who will review and assess the level of risk. Travel (and accommodation) will only be booked if the level of risk is acceptable.
- 20 In recognition that the security of your personal belongings rest with a third-party during periods of overseas travel (e.g. when luggage is checked in at an airport), and that you may require medical assistance when abroad, Estyn will reimburse you for the cost of a single

trip insurance policy up the value of £20 where there is no existing cover. Your expense claim should include both the receipt and a copy your travel insurance certificate showing the period of cover and territorial limit(s).

### **Third party reimbursement**

- 21 If you attend activities or events organised by other public bodies the normal practice is to not claim reimbursement of any expenses from the organiser. You should only claim travel and subsistence from Estyn and ensure that all forms of reimbursement that may be due from outside bodies are processed through the Finance team.

### **Using Public Transport**

#### **Taxi hire and gratuities**

- 22 You may claim for reimbursement for taxi hire costs where the journey is for official business purposes and the taxi hire is required:
- a) to connect to public transport systems, for example, when catching an early train or flight departure, i.e. when there is no convenient public transport available from the initial point of departure; or
  - b) for health & personal safety reasons, for example, a person has a physical ailment, or is travelling with heavy luggage and/or sensitive documents, or is travelling late at night; or
  - c) for short journeys, where the saving of time is of paramount importance.

N.B. Claims for reimbursement of gratuities, e.g. to taxi, railway and hotel staff, are not official business expenses and will not be reimbursed by Estyn

### **Rail travel**

- 23 If you need to travel by train on official business please email [transport@estyn.gov.wales](mailto:transport@estyn.gov.wales), detailing the journey required.
- 24 If there are instances where it is necessary for you to purchase tickets directly then you will need to use your procurement card or retain receipts and claim reimbursement via SAP Concur.
- 25 When you travel on official business directly from home you may request a rail ticket to be issued for you to travel from your nearest station. You may also claim expenses necessarily incurred for travel from home to the nearest station and for the corresponding return journey to home.

### **Air and sea travel**

- 26 Air and sea travel requirements should be discussed with the Finance team, who will advise and make bookings, as required. Please email: [transport@estyn.gov.uk](mailto:transport@estyn.gov.uk)

### **Travel by private vehicle on official business**

- 27 Estyn will normally reimburse you only for expenses which you actually and necessarily incur during official business using your own private vehicle. This reimbursement is by means of a motor mileage allowance.
- 28 For the purposes of payment of the motor mileage allowance, the following may be regarded as your private vehicle:
- a) a vehicle owned or a vehicle being bought on hire purchase and which in either case is registered in your name
  - b) a vehicle hired by you under a long-term contract (one year or more)
  - c) a vehicle registered in the name of a family member provided that the insurance requirements below are complied with
- 29 Normally, motor mileage allowance will be paid to you when you drive the private vehicle. However, payment of motor mileage allowance may also be given in the following circumstances:
- a) when you travel on official business in a vehicle which you own but on that occasion is being driven by another person; or
  - b) subject to the insurance provisions, when your car is being used solely on official business, but you are not present on either the outward or return journey (e.g. when it is used to take you to or from an airport).

### **Mileage entitlement**

- 30 Mileage claims should be for the shortest practical route of the journey as evidenced by Google Maps or SAP Concur. In exceptional cases where a longer route is required, for example, due to road closure, an explanatory note should be added in the comments section in SAP Concur.
- 31 Home-based workers only: When the business journey starts and ends at home, then the full mileage of the journey can be claimed.
- 32 Office-based workers only: Colleagues who are contractually office-based can claim travelling expenses when travelling between home and a temporary place of work when



their journey is substantially different from their ordinary commuting journey. To be substantially different, journeys must meet the following criteria:

- be from home to a temporary workplace which is 10 miles away from the office; or
- be in a different direction to their ordinary journey to the office [NB: to determine if the journey is in a different direction, colleagues should draw a line, as the crow flies, between their home and the office and add a parallel line 1 mile either side to give a 2-mile-wide corridor. If the temporary workplace is outside of this corridor, then it will be considered as being in a different direction].

33 If colleagues stop at a temporary workplace that is along their normal commute (i.e. within the 2-mile corridor) whilst on their way to the office, and that temporary workplace is 10 miles or more away from the office then the mileage to the temporary workplace and the onwards journey to the office can be claimed. Note that the return journey from the office cannot be claimed as this is classed as an ordinary commute.

34 If you start and end your journey from your contractual place of work (i.e. Anchor Court), you can claim the full mileage of the journey.

35 Ordinary commuting is any journey between an employee's home (or any other place they do not have to attend for work purposes) and a permanent workplace. Generally, you will not be able to claim for your commute except in a small number of exceptional circumstances. Section 248 of the Income Tax (Earnings and Pensions) Act 2003 exempts from tax some normal place of work to home journeys that might be paid for or provided by an employer. It should be noted that to qualify for the tax exemption, HMRC require that a full set of conditions are met for the following circumstances:

- a) when you are required to stay exceptionally late at the office or when normal car sharing arrangements are unavailable (HMRC guidance on conditions - <http://www.hmrc.gov.uk/manuals/eimanual/EIM10210.htm>; <http://www.hmrc.gov.uk/manuals/eimanual/eim21831.htm>)
- b) when you are travelling under the emergency arrangements operated at times when public transport is disrupted. (HMRC guidance on conditions: <http://www.hmrc.gov.uk/manuals/eimanual/EIM10100.htm>; <http://www.hmrc.gov.uk/manuals/eimanual/eim10120.htm>)

36 Please contact the Finance team if you believe you may be entitled to reclaim the cost of your commute in an exceptional circumstance.

37 If you use your private motor vehicle to carry passengers whose fares would otherwise be paid from public funds you can claim a passenger supplement for each passenger, as set out in Appendix A.

## **Mileage rates**

- 38 The rates of motor mileage allowance (Appendix A) are authorised by His Majesty's Revenue and Customs to reflect the typical costs of using a private vehicle for business purposes. There are generally no implications for taxation or national insurance contributions for individuals but in instances where a liability does occur Estyn has the discretion to meet some or all of such liability.
- 39 In accordance with His Majesty's Revenue and Customs (HMRC) regulations, payment of the approved standard rate can only be made for business travel up to 10,000 miles in any single tax year. Any mileage claimed over this limit can only be paid at the lower rate approved by HMRC. For example, if you exceed the number of miles allowed at the higher rate of standard motor mileage in a single financial year, all subsequent claims within the same financial year will be reimbursed at the lower rate (please see Appendix A).

## **Insurance for your personal vehicle**

- 40 Prior to using your vehicle on official Estyn business, you must check that your vehicle meets the insurance requirements of this policy and is in a roadworthy condition (including covered by an MOT certificate, if appropriate). You will be making a declaration of the above each time you submit a travel claim, i.e. there is a declaration included on the claim form. Estyn may periodically request sight of your drivers license and insurance documents.
- 41 To use your own private motor vehicles for official business you must be insured without financial limit against claims in respect of:-
- a) bodily injury to or death of third parties
  - b) bodily injury to or death of any passenger
  - c) damage to the property of third parties
- 42 It is your responsibility to ensure that your insurance policy covers the risks set out below and that the policy allows either:
- a) use of the vehicle by the policy holder in person in connection with his/her business; or
  - b) use of the vehicle by the policy holder in person on the business of their employer (Estyn).
- 43 Estyn staff are deemed to be on duty for the purpose of the Principal Civil Service Pension Scheme [section 2(1) of the Superannuation Act 1972] (unless they are members of another occupational pension scheme which makes similar provision) while using their private motor vehicle on official business or travelling as an official passenger in another

person's car. Staff are also covered by the Social Security Act 1975 subject to the decision of the Statutory Authorities in a particular case. In other respects, provision for injury or death due to an accident while using your vehicle on official business is your own responsibility.

### **Loss or damage to your personal vehicle**

- 44 Estyn will not reimburse you for any loss or damage resulting from the use of your private motor vehicle on official business whether or not the cost of such loss or damage can be claimed under your insurance policy.
- 45 If your insurance policy is subject to an excess clause, Estyn will not reimburse the cost of any loss and damage which cannot be recovered from the insurance company because of the operation of that excess clause.

### **Car hire**

- 46 Hire cars are generally an expensive form of transportation and should only be requested in exceptional circumstance such as,
  - a) when your own vehicle has a fault or is scheduled for maintenance
  - b) when you are required to transport bulky items on behalf of Estyn
  - c) when you have incurred high business mileage in any one financial year
  - d) when, due to the geographical location of an activity, it may be impractical to use an electric vehicle
  - e) when you are travelling as a group
- 47 When appropriate and cost-effective to do so, you may request a hire car to undertake your journey. There are many factors that affect the cost-effectiveness of hiring a car. These include the hire charges, the distance being travelled, the number of days required, the number of passengers and any delivery and collection costs.
- 48 For staff with contracts requiring them to undertake regular travel, you should normally only consider requesting a hire car when:
  - a) you have reached a travel mileage threshold of 4,000 miles within the first 9 months of the financial year; and
  - b) your journey includes travel of 100 miles or more in any single day.
- 49 Please refer to Appendix E for further explanation.

- 50 For staff with contracts that do not specify the need to undertake regular travel the 4,000 miles threshold does not apply, but you should normally only consider requesting a hire car when the journey is more than 100 miles in a single day.
- 51 When using a hire car, you may use the car outside of your official duties only to undertake reasonable journeys to meet your normal daily needs, such as having an evening meal away from the place you are staying. Low-emission vehicles should always be used unless there are clearly defined reasons as to why another car should be used, for example, personal safety or a reason related to disability.
- 52 Hire cars that are returned to the hire company without a full fuel tank result in Estyn being charged for fuel at rates approximately 30% above forecourt prices. Please ensure that you refill the vehicle fuel tank at the end of the hire period to help Estyn avoid excessive charges. The Finance team monitors and reports on hire car costs, including refuelling charges, to check that the cost of hire cars is no higher than necessary.
- 53 Hire cars should only be driven by those whose name appears on the hire agreement. If you intend to share driving responsibilities, you must state this and provide the names of all drivers when requesting a car. Failure to provide the required information may mean that some colleagues will be driving without appropriate insurance being in place.
- 54 To request a hire car, please email [transport@estyn.gov.wales](mailto:transport@estyn.gov.wales) with details of your journey.
- 55 The provision of a hire car is subject to availability and cannot be guaranteed.

### **Long-term and short-term parking fees and tolls**

- 56 When using a private motor vehicle (or hire car) on official business you may be reimbursed the cost of long-term and short-term parking fees and toll charges.
- 57 Costs should be kept to a minimum and you should try to use free parking where available. You will not be entitled to reimbursement for car parking fees which are not directly attributable to official visits. Car parking fees incurred prior to official travel will not normally be reimbursed (e.g. you are responsible for the full costs of getting to your normal place of work).
- 58 Charges for overnight parking will only be reimbursed where it is necessary for you to stay overnight when undertaking official duties.

### **Fixed penalty charges and fines**

- 59 Charges for illegal parking, speeding or traffic fines, or other penalty charges will not be paid or reimbursed by Estyn, this includes any administration costs added to fines that are incurred when using a car hired through Estyn.

**Loss or damage to your personal possessions**

60 Estyn has no liability to pay compensation for the loss of or damage to your personal property either in this country or abroad (see [International travel](#) above for details of arrangements whilst overseas) whilst you are travelling on official business. However, claims for losses or damage to personal property can be considered provided that the following criteria are satisfied:

- the loss is not covered by insurance or free replacement
- you have not been negligent
- the amount or part amount is verifiable
- the loss was reported to a responsible authority

## Section 2: Subsistence

### Principles and rules

- 61 Subsistence is defined as “food, drink and temporary living accommodation” and is intended to reimburse such necessary additional costs of working away from the normal place of work or home on official duty. Where no extra expense is incurred the rule is that no reimbursement in the form of subsistence is appropriate. Subsistence payments are not a form of compensation for time spent out of the office on official business, nor are they pensionable. Claims for alcoholic drinks will not in any circumstances be reimbursed under subsistence arrangements.
- 62 Subsistence costs will only be reimbursed as long as they are actually incurred, are supported by valid receipts (or by way of note where a receipt is not available) and are within the overall agreed limits.

### Overnight stay policy – general principles

- 63 Individuals should not normally stay overnight at Estyn’s expense before or after a meeting/visit when it is reasonable to travel on the day of the meeting/visit and there is not an expectation to be working in the same locality on subsequent days. All overnight stays should be justifiable in terms of use of public funds and ensuring value for money. As a general guide one would not expect Estyn to incur costs for an overnight stay where the distance travelled from home to the working location is less than 30 miles (one-way); in some cases, it might not be unreasonable for staff to travel greater distances without requiring overnight accommodation.
- 64 When working away from the normal place of work individuals should use their discretion to determine whether an overnight stay/s is necessary and can be justified. Factors to consider will include daily start and finish times of official business and the reasonableness or otherwise of daily travel, considering health and safety considerations and other relevant factors, such as longer travel times due to high traffic congestion. If in doubt, individuals should seek guidance from their line manager. The decision on whether there is a requirement for an overnight stay and the accountability for the subsequent T&S claim remains with the individual.
- 65 When requesting accommodation for a core or follow up inspection, or in exceptional circumstances for an interim visit, please enter your requirements on the Accommodation Log here: [Inspection Accommodation landing page \(sharepoint.com\)](#) and follow the instructions sent out by the Finance Team at the time each Term’s Work Programme is released – shown in Appendix D

- 66 When requesting accommodation for other ad hoc overnight stays please send your requirements to the [Travel@estyn.gov.uk](mailto:Travel@estyn.gov.uk) inbox where a member of the Finance Team will liaise with you regarding your booking.
- 67 It is advisable to request accommodation as far in advance as possible (preferably as soon as the work programme is published although we appreciate that it may be subject to subsequent changes). Please note, however, that as cancellation charges may apply and you should normally only confirm hotel bookings when the need for the business trip has been confirmed. Also, it is important to notify the Finance Team as soon as you know that accommodation is no longer required so that unnecessary charges can be avoided.
- 68 Estyn will aim to ensure that accommodation used by all individuals required to stay away from home for business purposes is reasonably safe, secure and has appropriate facilities. Further details of the standard levels agreed can be found in the **Travel Charter**.

### **Accommodation rates**

- 69 Estyn will always look to use the best value-for-money option and the Finance team will be guided by the following maximum rates:

#### **Maximum rate for B&B accommodation including car parking fees**

**Outside of London : £115 per night**

**In London : £200 per night**

- 70 There may be occasions when suitable accommodation is not available within the above limits, e.g. seasonal pressures and limitation of accommodation options. There may also be a genuine business need to stay at higher-rate accommodation, e.g. when undertaking joint inspection work led by an external partner. To document how value for money is appropriately considered, the Finance team will obtain prior authorisation from the relevant Assistant Director in all instances where accommodation costs in excess of the above limits.
- 71 There is no flat rate allowance that is payable to individuals who choose to stay overnight with friends and relatives, or when they stay in accommodation they own that is not their prime residence. However, you may continue to claim the cost of breakfast and/or an evening meal if you can provide a fully itemised and dated receipt.

### **Attendance at conferences, events and residential training courses**

- 72 Attendance at conferences, events and residential training courses is regarded as official business and the normal rules for accommodation and meals apply. However, if required to purchase meals or refreshments on site, individuals' will be reimbursed all reasonable

costs (excluding alcoholic beverages) that may exceed the policy limits, subject to the production of receipts.

- 73 If an individual is not required to attend training courses in the UK at the weekend and wishes to travel home, they may claim the cost of travelling to home and back to the training course based on the rates and rules of travel on official duties within this policy.

### **Refreshments and meals**

- 74 When not at home and away from your contractual place of work, you may reclaim the cost of refreshments/food. The maximum permitted per day is shown in Appendix A. All claims for refreshments and meals must be supported by receipts.
- 75 Where providers supply refreshments and do not accept cash or card payments, they need to complete the form in the provider documents which details the inspectors who are eligible for refreshments paid by Estyn. Providers will then use the form to invoice Estyn for the value of the refreshments. The cost of any refreshments purchased this way should be deducted from the limits shown in Appendix A. For example, the daily limit for a trip that involves an overnight stay is £36. If the cost of your lunch is £6 and the provider invoices Estyn for this directly, you should reduce your daily limit to £30.

### **Worldwide Subsistence Rates**

- 76 For subsistence rates and limits overseas, please refer enquiries to the Finance team who will advise on the application of the latest Worldwide Subsistence Rates provided by HMRC.



## Appendix A: Estyn travel and subsistence rates: effective from 1<sup>st</sup> December 2022

Item	Rate	Information
Standard mileage rate (private car use)	45p per mile (up to 10,000 miles per annum) 25p per mile (for mileage in excess of 10,000 miles per annum)	In accordance with Her Majesty's Revenue and Customs (HMRC) regulations, payment of the approved standard rate can only be made for business travel totalling 10,000 miles in any single tax year. Any mileage claimed over this limit can only be paid at the lower rate approved by HMRC.  Mileage allowances are payable for the mileage by the shortest practicable route.  When travelling on official business and the journey starts and ends at home, the full mileage of the journey can be claimed.
Motor cycle	24p per mile	
Pedal cycle	20p per mile	
Passenger supplement	5p per mile	If you use your private motor vehicle to carry passengers whose fares would otherwise be paid from public funds you can claim a passenger supplement for each passenger.
Electric and hybrid vehicles on the Tuskar Scheme	Please refer to <a href="https://www.gov.uk">Advisory fuel rates - GOV.UK (www.gov.uk)</a>	If you have an electric or hybrid vehicle provided via the Tuskar salary sacrifice scheme then you can claim the appropriate advisory fuel rate as provided by HMRC.  Please note that the rates differ for 100% electric vehicles, petrol hybrids and diesel hybrids. The rates for hybrid vehicles also varies depending upon the engine size. The rates are reviewed quarterly on the 1 <sup>st</sup> of March, June, September and December each year.
Breakfast (max) <b>No overnight stay</b>	£9	Where breakfast is not included as part of the Estyn accommodation booking, individuals may claim for the cost of breakfast up to the maximum rate (receipts must be retained).  The cost of breakfast (subject to the maximum limit) may be claimed if an individual is required to leave home exceptionally early, i.e. before

Item	Rate	Information
		6.30am, to travel on official duties (excluding travel to your normal place of work).
Lunch (max) <b>No overnight stay</b>	£9	If an individual is away from their normal place of work for more than 4 hours, including the period 12:00hrs to 14:00hrs, they may reclaim the cost of lunch (including refreshments, e.g. teas and coffees) up to a maximum of £9 (excluding alcohol). Receipts must be retained. Individuals should seek to agree a 'reasonable' reimbursement amount (representative of actual costs) with other public bodies/institutions (such as education providers) when being provided with refreshments/lunch, e.g. when on inspection.
Evening meal (max) <b>No overnight stay</b>	£10 (working after 7:30pm)	If unable to arrive home before 7:30pm when travelling directly from official duties, individuals may claim the costs of an evening snack/refreshments (excluding alcohol) up to the maximum rate.
Daily Limit for refreshments (max excluding breakfast) <b>Overnight stay</b>	£36 (outside of London) £44 (inside of London)	If an individual is away from their normal place of work for 4hrs or more and are staying overnight, the lunch and dinner limits can be combined to enable an individual, where appropriate to decide the way in which they use their meal limits. Staff are still reminded that this is not an allowance it is a maximum and staff should always be mindful of value for money and the use of public money. The cost of alcoholic beverages will not be reimbursed.  Note: If the cost of lunch is being paid directly to the provider (see para 71) then you are advised to confirm the amount being charged as it remains your responsibility to ensure that the total cost of subsistence incurred throughout the day does not exceed the £36 limit (outside of London) or £44 (London).
Daily Limit for refreshments (max)	£19	If an individual is away from their normal place of work for 4hrs or more and are not staying

Item	Rate	Information
excluding breakfast) <b>No overnight stay</b>		<p>overnight, the lunch (£9) and dinner (£10) limits can be combined to enable an individual, where appropriate to decide the way in which they use their meal limits. Staff are still reminded that this is not an allowance it is a maximum and staff should always be mindful of value for money and the use of public money.</p> <p>The cost of alcoholic beverages will not be reimbursed.</p> <p>Note: If the cost of lunch is being paid directly to the provider (see para 71) then you are advised to confirm the amount being charged as it remains your responsibility to ensure that the total cost of subsistence incurred throughout the day does not exceed the £19 limit.</p>

## Appendix B: SAP Concur claim process (Internal claims only)

1. All staff claiming T&S through SAP Concur must first have a supplier account setup on our finance system. To be setup as a supplier, complete our [BDF1](#) form and return it to [finance@estyn.gov.uk](mailto:finance@estyn.gov.uk)
2. The SAP Concur account will be generated for users linking the supplier account to the staff members password. The user will be notified, with instructions for how to set their account password and to [use the system](#).
3. Users must title their claims as the year and month of the claim as per the guidance attached to the above point.
4. Before claiming milage the user must register their personal vehicle(s) on their account. This can be done by [clicking here](#), signing into their SAP Concur account and completing the web form.  
***N.B the user is responsible for ensuring that the business distance is an accurate reflection of the business milage completed this financial year (Estyn's financial year runs from 1<sup>st</sup> April until 31<sup>st</sup> March respectively)***
5. Users are able to create, submit and approve claims using either the SAP Concur web portal, or the SAP Concur mobile App.
6. Users have the facility to add expenses manually on either the web portal or the mobile app and can make use of the app's automated features  
***N.B. It is the user's responsibility to ensure that the value claimed, regardless of the method that it has been added to the claim form, is true and accurate and is responsible for informing the Finance Team of any inconsistencies at the earliest possible opportunity.***
7. Users understand that by using the Concur Drive function of the SAP Concur Mobile App they consent to SAP Concur using their phone's location services for the reasons outlined in the App's privacy policy, and understand that they reserve the right to withdraw permission for SAP Concur to use their phones location services at any time.
8. SAP Concur has built in functionality to draw managers' attention to certain aspects of each claim. Approvers must review these aspects of the claim before forwarding the claim to the finance team for payment, if there are any inconsistencies that do not have a supporting (or appropriate) comment the claim shall be returned to the claimant for further explanation.

9. The Finance Team shall review the highlighted aspects of all claims submitted to them to ensure that appropriate responses have been submitted and where necessary will return the claim to the claimant for further explanation.

## Appendix C: Example email inviting HMI to register their accommodation requirements

Dear Colleagues

Happy New Year!

We are starting to look at bookings for the Summer Term XXXX and thought it would be opportune to remind you of the process you need to follow to request accommodation and where appropriate, if you are the RI, state 3 suggested hotels for us to research. Your accommodation requirements will be managed in accordance with Estyn's T&S policy, and we will endeavour to liaise with the RI before making any bookings. Please can you include any hotel suggestions, and dates you require to stay, if only part of the inspection is required, this will help us to ensure that your booking will meet your requirements.

Here is the link to the [desknotes](#) detailing the steps you will need to go through to complete your request.

Access to the accommodation booking page for **Summer XXXX** is now open and can be accessed here

 <https://estyn.gov.uk.sharepoint.com/Corporate/Finance/SiteAssets/AccomHMI.aspx>

We will start booking accommodation for inspection teams week commencing **XX/XX/XXXX**. This will give you **10** working days to consider your accommodation requirements and preferences for **Summer XXXX**.

For your convenience, the following link '[Check my Bookings](#)' can be copied into your Outlook calendar to enable you to check your accommodation on a regular basis.

In addition, all accommodation information relating to inspections can be found through the following link:

<https://estyn.gov.uk.sharepoint.com/Corporate/Finance/SitePages/Inspection%20accommodation.aspx>

You can expect an email alert when we enter your accommodation confirmation into SharePoint during this phase of booking and for any subsequent changes/amendments. We would ask if you to check your bookings at notification to ensure adequate time if the booking needs to be altered/amended.

Please speak to either Rachel Harris - [Rachel.harris@estyn.gov.wales](mailto:Rachel.harris@estyn.gov.wales) if you require further help in navigating the log and we will be happy to organise training.

## Appendix D: Car hire thresholds

For staff with contracts requiring them to undertake regular travel, you should normally only consider requesting a hire car when:

- a) you have reached a travel mileage threshold of 4,000 miles in any one financial year;  
and
- b) your journey includes travel of 100 miles or more in any single day.

**The following scenarios illustrate how this works in practice.**

### Scenario 1

An individual has travelled 3,000 miles during the financial year to date and they request a hire car. They would not be eligible for a hire car because the distance travelled is below the baseline of 4,000 miles.

### Scenario 2

An individual has travelled 4,000 miles during the financial year to date. They are going on inspection which lasts 4 days. The distance from their home address to the provider is 110 miles. During the inspection they will travel 10 miles per day between their accommodation and the provider before returning home. Because the individual has reached the baseline and the journey involves a single day of travel which is 100 miles or more, they would be eligible for a hire car.

### Scenario 3

An individual has travelled 4,000 miles during the financial year to date. They are going on inspection which lasts 4 days. The distance from their home address to the provider is 90 miles. During the inspection they will travel 5 miles per day travelling between their accommodation and the provider before returning home. Although the individual has reached the baseline, the journey does not involve a single day of travel which is 100 miles or more and consequently they would not be eligible for a hire car.

### Scenario 4

An individual has travelled 4,000 miles during the financial year to date. They are going on inspection which lasts 4 days. The distance from their home address to the provider is 28 miles. They travel daily to the inspection from home. Their round trip each day is 56 miles. Although the individual has reached the baseline, and the total mileage incurred for the week is similar to scenario 2, the journey does not involve a single day of travel which is 100 miles or more and consequently they would not be eligible for a hire car.

For staff with contracts that do not specify the need to undertake regular travel the 4,000 miles threshold does not apply, but you should normally only consider requesting a hire car when the journey is more than 100 miles in a single day.